Monterey County

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Board Report

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Introduced: 4/29/2016	**Current Status:** Consent Agenda
Version: 1	**Matter Type:** General Agenda Item

Approve and adopt the County of Monterey Electronic Mail Deletion, Retention, Storage and Backup Policy, as presented.

RECOMMENDATION:

It is recommended that the Board of Supervisors:

a. Approve and adopt the County of Monterey Electronic Mail Deletion, Retention, Storage and Backup Policy, as presented.

SUMMARY/DISCUSSION:

In July 2014, the Board of Supervisors adopted the County Records Management Policy, providing for consistent standards of responsible recordkeeping across all County Departments. The County Records Management Policy provides that electronic communications (e-mail) is intended to be a medium of communication, not records storage; that routine e-mail messages are non-records, not intended to be retained in the ordinary course of County business; that each e-mail user is responsible for removing such non-records from the County's e-mail systems; and that upon removal, such e-mails will be routinely destroyed.

The Electronic Mail Deletion, Retention, Storage and Backup Policy (E-mail Management Policy) implements the County Records Management Policy, as it pertains to e-mail, with a County-wide procedure governing retention, storage, deletion and backup of County e-mail messages and associated attachments. It will allow the County to manage e-mail messages and attachments efficiently and cost effectively, consistent with applicable retention policies, legal requirements, and industry best practices.

The E-mail Management Policy has been developed with input from County Department Heads and County Counsel, in order to establish a uniform policy for the retention and management of County emails. The E-Mail Management Policy will also reduce significant and unnecessary expenditures attendant to the County's current e-mail backup and recovery practices, which utilize significant electronic storage and staff resources. In addition to the drain on County resources, the County's current back-up tools are unreliable and operationally obsolete.

In place of expensive and antiquated practices and tools, the Information Technology Department (ITD) will deploy a document management tool in which e-mails and associated attachments of lasting value can be indexed and electronically stored, in accordance with Board-approved records retention schedules. ITD has identified the Questys Microsoft Integrator Product as best suited to meet County needs.

Implementation of the proposed policy, if adopted, will require resources from the Information Technology Department (ITD) to execute an agreement with Questys to license and deploy the Questys Microsoft Integrator product at an estimated cost of $50,500. ITD has demonstrated the utility of the Questys document management product to various County Department staff; it is integrated into Microsoft Outlook and provides for indexing and electronic storage of selected e-mail and attachments within seconds. Additionally, ITD staff will train County staff in the use of the Questys document management product, and will perform special customization tasks, as requested by County staff to meet particularized business needs, at a total labor cost of approximately $12,000.

This project will be financed through Board approved FY 2016-17 ITD CIP funds.

OTHER AGENCY INVOLVEMENT:
County Counsel has worked with ITD and other departments in the development of the E-Mail Management Policy. All Departments have been provided with opportunity to review, ask questions, and provide feedback on the proposed policy.

FINANCING:
Funding for this project will come from Board approved FY 2016-27 ITD CIP funds.

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Approved by:

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Attachments:
   County of Monterey Electronic Mail Deletion, Retention, Storage and Backup Policy